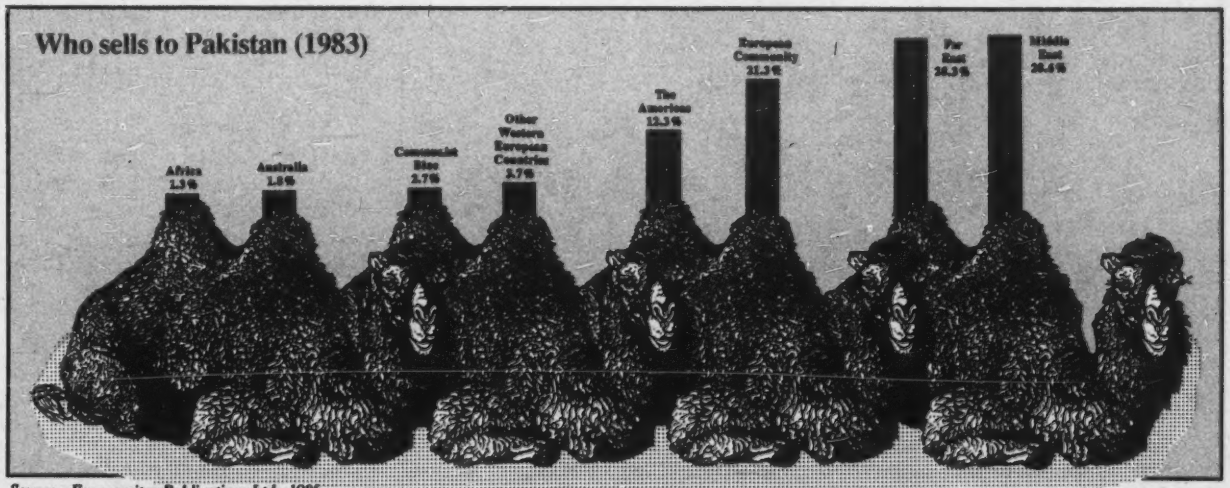
CONSUMER TRENDS AND MARKETS ABROAD
JULY 1986 VOLUME 5, NUMBER 7

International Demographics



Source: Euromonitor Publications Ltd., 1985

COUNTRY PROFILE

The Islamic Republic of Pakistan

"Pakistan...composed of letters taken from the names of our homeland...Punjab, Afghana, Kashmir, Iran, Sindh, Tukharistan, Afghanistan, and Baluchistan. It means the land of the Paks, the spiritually pure and clean." So stated a group of Muslim students in Cambridge, England 14 years before the British parliament carved Pakistan out of India in 1947. The India Independence Act created two separate and independent dominions. India was to be predominately Hindu; Pakistan was to provide a "homeland for South Asian Muslims."

The original partitioning allowed for both an East and West Pakistan separated geographically by India. However, in language, culture, ethnic background, and economic resources, these two areas were totally disparate. Their only bond was their state religion--Islam. Years of violence ensued. Finally, in 1971, a large Indian army entered on the side of Bengali separatists, and Bangladesh was born. With the secession of East Pakistan, the modern boundaries of Pakistan were finalized.

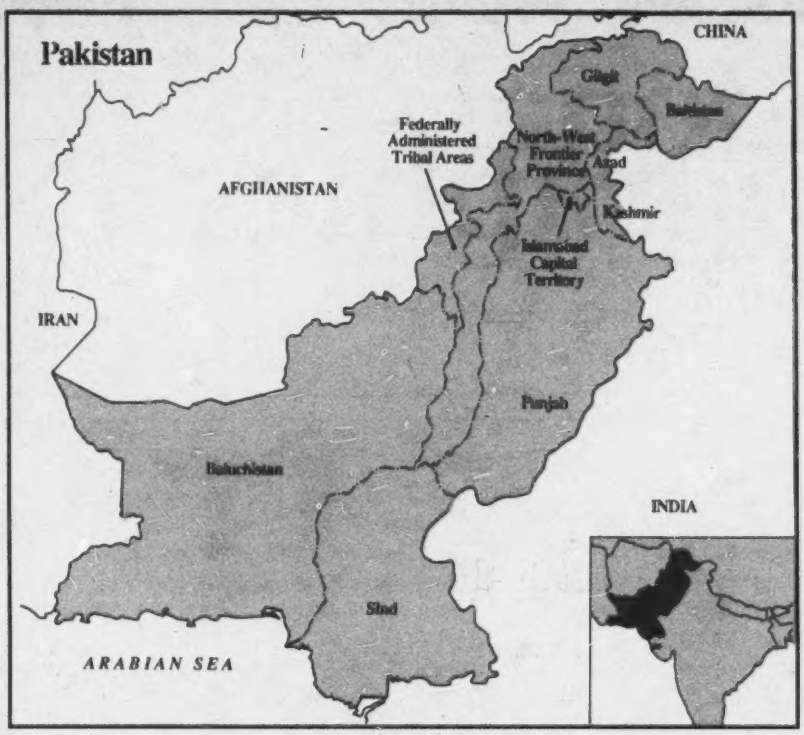
Pakistan is now in a period of transition. For most of 1985, President Mohammed Zia-ul-Haq (who seized power in 1977) ruled Pakistan under martial law. On December 30, 1985 martial law was lifted and a modified version of the 1973 constitution was adopted, restoring fundamental rights of Pakistanis and powers of the judiciary. Zia remains head of the Pakistani state (and Chief of Army Staff) but shares authority with Prime Minister Mohammed Khan Junejo, leader of the majority party in the National Assembly.

Pakistan's 796,095 square kilometers make it just larger than the state of Texas. Not included in the area are the disputed Pakistan-held areas of Jammu and Kashmir, an additional 95,181 square kilometers. These areas and Baltistan and Gilgit in the North are not included in the Pakistani census.

continued

INSIDE

Can you trust population projections?.....4
Doing business in Pakistan.....5
How French women see themselves.....9



Topographically, Pakistan divides into three areas: the mountainous terrain of the northern highlands, the fertile and densely populated Indus Plain along the eastern border, and the arid Baluchistan Plateau in the southwest.

REGIONS AND CITIES

Pakistan is divided into four provinces--Punjab, Sind, North West Frontier Province (NWFP) and Baluchistan. Outside the provincial boundaries and along the western border is the Federally Administered Tribal Area (FATA). The Federal Capital Territory Islamabad, a separate and distinct government territory, is often grouped with Punjab Province for census purposes.

The last census recorded the 1981 population at 84.3 million--nearly double the 1961 figure of 42.9 million. The Pakistani government estimated the 1984 population at 93.3 million, excluding the disputed Pakistani-controlled areas and Afghan refugees. The U.S. government placed the total population higher, at about 99.2 million. By mid-1986, Pakistan's population is estimated to swell to nearly 102 million.

Pakistan's average annual growth rate of just over 3 percent since 1981 makes it one of the world's fastest growing countries. Pakistan's fastest growing province is also its largest. Baluchistan's population increased from 2.4 million in 1972 to 4.3 million in 1981. FATA is the only area showing a loss of population--from 2.49 million in 1972 to 2.2 million in 1981, a decrease of 12 percent.

Pakistan averages 100 people per square kilometer although the figure varies greatly between provinces and areas. Federal Territory Islamabad is the most densely populated with 376 people per square kilometer, followed by Punjab with a density of 230 people per square kilometer. Baluchistan, with only 12 people per square kilometer, is Pakistan's least populated area.

As are most developing countries, Pakistan is urbanizing rapidly. Between 1951 and 1981 the urban population quadrupled. By 1981, 28 percent of Pakistanis lived in cities. Projections place 40 percent of the population in cities by the year 2000.

Karachi--the capital of Sind Province--outpaced all other Pakistani cities with its population increasing by 250 percent between 1941 and 1951 and doubling again the following decade. Karachi's 1981 population of 5.1 million makes it Pakistan's largest city. The industrial and commercial nerve center of the country, Karachi accounts for about half of Pakistan's manufacturing output.

Pakistan's newest city, the federal capital of Islamabad, grew rapidly to a population of nearly a quarter million in the years since construction began in 1961.

SUNNI DOMINANT ISLAMIC SECT

Although created as a sanctuary for followers of Islam, Pakistan suffers from periodic disputes between the members of Islam's various sects. Sporadic outbursts of violence harm national unity.

Sunni Muslims are in the majority and control the government. Their practices, codified as law under President Zia, are opposed by the Shiites who make up between 20 to 25 percent of the population. Particularly grating to Shiites are the 1979 Hadood Ordinances instituting the traditional Islamic penalties of flogging, stoning, and amputation. Offenders are tried by Shariat benches, a judicial arm of the government in which church and state are one. However, although Sunni customs prevail, many minority Muslim sects enjoy the

International Demographics

PUBLISHER: DORIS WALSH EDITOR: DENISE RUSOFF ART DIRECTOR: CAROL TERRIZZI

International Demographics (ISSN 0731-5414) is published monthly by American Demographics, Inc., P.O. Box 68, Ithaca, New York 14851. Telephone (607) 273-6343. Copyright 1986 by American Demographics, Inc. All rights reserved. Subscription rate $148 a year. Multiple subscriptions of three or more billed to the same address $69 a year.

protection of the law and are represented at the provincial and national level of government.

Some sects have not fared so well. A constitutional amendment in 1974 barred the Ahmadi sect from membership in the Islamic community. As non-Muslims, Ahmadis as late as 1984 were prohibited from using Islamic terminology or from converting others to their faith.

Ninety-eight percent of the Pakistani population is Muslim. The remaining two percent--mainly Hindus, Christians, and Parsis--can worship freely but are prohibited from preaching to Muslims and are denied some legal rights.

ETHNICITY AND LANGUAGE

Punjabis remark that every 25 kilometers in Pakistan means speaking a different language. Twenty spoken languages and numerous dialects make them right. Pakistan's official language, Urdu, is native to only about 8 percent of Pakistanis. English, the language of commerce, is in general use in government offices, military installations, business organizations, and institutions of higher learning.

Generally, ethnic groups and the use of their native languages divide along provincial boundaries. Punjabi, the native tongue of Pakistan's predominant group, is spoken in 48 percent of all Pakistani households and in about 80 percent of Punjab and Islamabad Federal Territory households. Sindhi is spoken by 52 percent of households in Sind Province, Pushto in 68 percent of NWFP households. Pushto, native language of the FATA, is spoken by FATA's entire population.

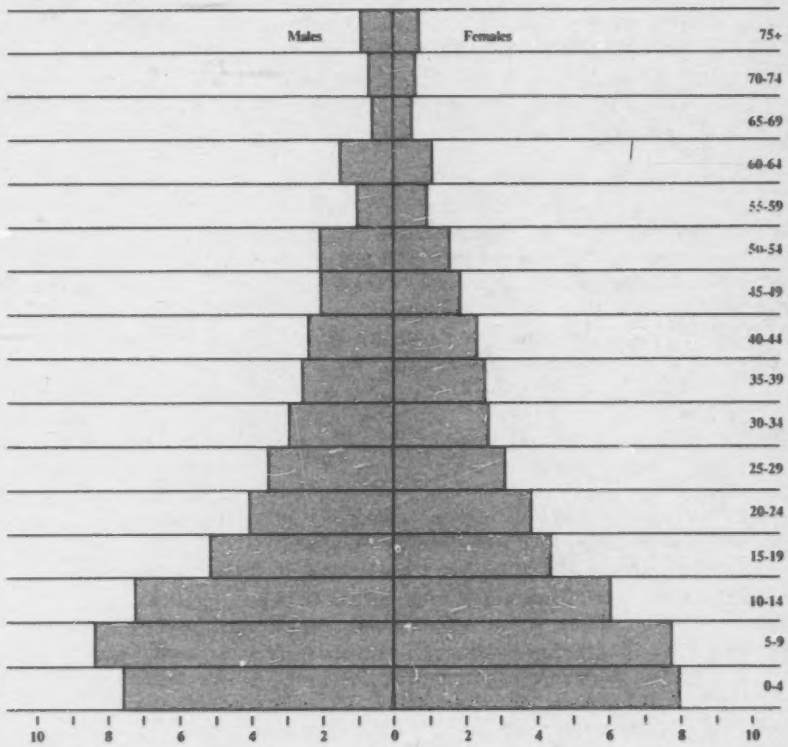
Afghans are Pakistan's fastest growing ethnic group due to immigration caused by the Soviet occupation of Afghanistan. In 1983, 2.2 million Afghans resided in 300 camps located primarily in the NWFP and Baluchistan. Afghan refugees brought with them an estimated 2.5 million head of livestock (camels, goats, and sheep). As these herds compete with local stock for water and grazing areas, refugees are not always welcomed with open arms.

Despite support from the international community, the Pakistan government spends an estimated $1 million a day to support Afghan refugees. Pakistanis fear that Afghans will not repatriate even if the Soviets withdraw.

RUNAWAY POPULATION GROWTH

At independence in 1947, Pakistan was home to 32 million people. By 1984, the population had tripled to nearly 93 million, making Pakistan the world's ninth most populous country, although in area it ranked 34th. Its 3 percent annual growth rate placed it among the world's fastest

Pakistan population distribution by age group and sex, 1981 *(in percent)*



age group	*total*	*male*	*female*
All Ages	84,253	44,232	40,021
0-4	12,948	6,334	6,614
5-9	13,485	7,003	6,482
10-14	11,083	6,054	5,029
15-19	7,948	4,328	3,620
20-24	6,560	3,358	3,202
25-29	5,605	2,970	2,635
30-34	4,731	2,449	2,282
35-39	4,301	2,173	2,128
40-44	3,958	1,986	1,972
45-49	3,147	1,650	1,497
50-54	3,028	1,674	1,354
55-59	1,641	879	762
60-64	2,256	1,327	929
65-69	1,003	567	436
70-74	1,175	688	487
75+	1,384	792	592

Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan.

TIPS ON TRENDS

Can you trust population projections?

Yes. Projections are not only necessary but often fairly accurate. But they're only as good as the data they are based on. To make sure, check the source and timeliness of the data. As up-to-the-moment data are not available for all countries at all times, assessing trends can be particularly difficult.

Take the difference between 1980 United Nations projections for population growth in urban agglomerations worldwide and the 1982 projections, for example. Declining rates of natural increase in some of the world's largest cities led to some big reductions in population projections for the year 2000. These revised projections are based on the most recent and reliable data from the 1980 round of national censuses and on new survey data.

The most dramatic reductions in UN projections included estimates for Beijing and Shanghai, Mexico City, and Tokyo/Yokohama. Earlier projections for Beijing and Shanghai were based mostly on the 1953 census while the revised ones took into account actual trends in these cities up to 1982 and the 1964 and 1982 censuses. It makes sense, then, that Beijing's projected size in the year 2000 was reduced from 22.8 million to 10.8 million and Shanghai's projected size shrank from the 1980 estimate of 25.9 million to 13.5 million.

Mexico City was a different story. The recently released estimate decreases Mexico City's projected population in 2000 from the 1980 estimate of 27.6 million to 26.3 million based on projected long-term effects of Mexico's decline in fertility.

Part of the decline in projected growth for Tokyo/Yokohama results from a greater than expected reduction in fertility in Japan. Data from the 1975 and 1980 censuses shows that Tokyo/Yokohama grew more slowly than it did earlier in the century. The population of Tokyo/Yokohama is now projected to be 17.1 million in the year 2000, down from the 1980 estimate of 23.8 million.

Not all projections went down, however. Calcutta in the year 2000 now is projected to have 16.6 million, instead of the 1980 estimate of 15.9 million. The projection for Brazil's Sao Paulo also climbed, from the 1980 estimate of 21.5 million to 24 million.

Although the UN predicts lower population projections for many of the world's largest cities, the trend towards larger cities continues. In 1950, about 30 percent of the world's population lived in urban areas. By 1980, almost 40 percent did. UN projections now place half of humanity living in cities by the year 2025.

A recently released UN publication, *Estimates and Projections of Urban, Rural and City Population: the 1982 Assessment*, offers revised projections for urban agglomerations worldwide. According to this publication, Mexico City will be the world's largest city in the year 2000, with 26.3 million people. Sao Paulo with 24 million places second; Tokyo/Yokohama with 17.1 comes in third. Other giants include Calcutta with 16.6 million people; New York/N.E. New Jersey, 15.5 million; Seoul,13.5 million; Shanghai, 13.5 million; Rio de Janeiro, 13.3 million; Delhi,13.3 million; and Greater Buenos Aires, 13.2 million.

growing countries. To continue growing at this rate means a population estimated to reach 150 million by the year 2000.

The reduced birthrate from about 46 per 1,000 population in 1965 to 42.6 per 1,000 in 1985 produced some gains. These gains, however, have been partially offset by the change in the age structure.

From 1960 to 1970, Pakistan's fertility rate--the average number of children a woman will have borne by the end of her reproductive period--averaged 7.5 children. The period from 1970 to 1980 saw a decline to 6.6 children per woman. Although the government credits this decline to increased knowledge of family planning methods, the gap between knowledge and practice is still wide. Preliminary results of a 1985 contraceptive prevalence survey indicate that only 10 percent of respondents were practicing contraception (up from a mere 6 percent in 1975) although a majority of married women knew about family planning methods.

Pakistan's population is young. In 1980, 45 percent of the population was aged 0-to-14, 50 percent was aged 15-to-59, and only about 5 percent was aged 60 or over.

Only the 0-to-4 age group is atypical of developing countries, being slightly smaller than expected. One cause is Pakistan's rising infant mortality rate. From 1976 to 1979, the infant mortality rate averaged 94.2 deaths per 1,000 live births. It now averages 100 deaths per 1,000. Nearly half of all deaths of children under the age of five are due to childhood diseases such as measles, diphtheria, and whooping cough; diarrheal disease; respiratory infections; and neonatal tetanus--all of which can be prevented.

Government health facilities are available to all urban residents, although only 60 percent of rural dwellers have access to any type of health care. Facilities are unevenly distributed throughout the country, and severe shortages of medical personnel exist. Government programs for improving health care are often ineffective due to the low literacy rate, isolation of ethnic groups living in rural areas, limited education and work opportunities for women, and administrative problems.

Malaria and tuberculosis are major health problems affecting all ages. Although Pakistan's food supply is considered good when compared to neighboring countries, malnutrition is widespread and particularly affects young children, infants, and pregnant and nursing mothers.

Life expectancy in Pakistan is 55 years for men and 54 years for women, compared with the upper 70s for most developed countries. The government's Sixth 5-Year Plan aims to lengthen life spans to about 60 years for both men and women through improved medical.

HOUSING

Pakistan's Sixth 5-Year Plan recognizes the need for an additional 1.4 million dwellings to adequately house the current population. In 1980, Pakistan's 12.6 million dwellings averaged nearly 7 people per unit. Baluchistan homes are the most crowded, with an average

occupancy of 7.6 persons per unit. Urban Islamabad with 5.6 people per housing unit had the least people per unit.

Most Pakistanis own their own homes (78 percent), with less than 7 percent renting their dwellings. Nearly 15 percent of the population lives in rent-free housing. Although the census does not define the term "rent-free housing," several assumptions can be made as to its meaning. A number of industries, especially agriculture, provide housing for workers. Squatters' homes can also be considered "rent-free."

Rapid growth in Pakistan's urban areas--50 percent faster than in Pakistan taken as a whole--results in the proliferation of *katchi abadis*, or squatter settlements. These settlements now house an estimated 25 percent of Pakistan's urban dwellers. Generally, the larger the city, the larger the settlement. Karachi's settlement now houses an estimated 33 percent of the city's population.

The Pakistan government is attempting to supply water and sewer systems to the *katchi abadis* and plans call for electricity and street development projects.

Safe water and adequate sanitary and drainage systems are ongoing problems in all areas of the country. Potable water is available to 77 percent of urban dwellers and 22 percent of rural residents. The existing water supply is subject to unscheduled turnoffs and is available only during limited hours. Lahore is the only city with a 24-hour water supply.

Sanitary facilities and sewage systems are less common than piped water. Only 16 percent of the population has adequate sanitary facilities (48 percent of urban dwellers, 4 percent of rural residents).

HOUSEHOLDS AND FAMILIES

The ideal Pakistani household is an extended family consisting of a married couple, their sons, and their sons' wives and children. Sons normally leave the father's house only in search of work, although

INSIDE INFORMATION

Doing business in Pakistan? Some negotiating tips

Are you male, right-handed, with the patience of a saint and the resources of a Rockefeller? Can you drive a hard bargain without becoming aggressive? If so, you're a natural for doing business in Pakistan.

Pakistanis are adroit businessmen and talented negotiators. When on home turf, they expect foreign businessmen to play by their rules. Rule number one is making first contact through a reputable agent. Your Pakistani agent is a crucial interface. Conducting business without one is nearly impossible. Consider your agent's work over

COMPARATIVELY SPEAKING

Illustration by Diana Souza

Pakistan's 1985 birthrate of about 40 per 1,000 population compares to 16 for developed countries and 28 for countries in its region.

COMPARATIVELY SPEAKING

when he arranges the requested appointment. Many agents, however, offer other services for the right price. The agent's fee is always negotiable. To avoid an unintentional insult, let the agent make the first offer.

Once an appointment is made, be sure to ask, "Your time or mine?" Pakistani time means being prepared to wait beyond the scheduled hour. To achieve the best results, schedule meetings for morning hours. Some businesses honor the Western weekend of Saturday and Sunday. Monday through Wednesday meetings, however, avoid delays, as the Muslim weekend normally falls on Thursday and Friday.

Although English is the language of commerce and business, a few Urdu phrases go a long way toward cementing relationships. At meetings, Pakistanis may lapse into Urdu to discuss certain points among themselves. No insult is intended.

According to custom, each meeting begins with social conversation. The business at hand should be brought up only when the Pakistani is ready. Any attempt to hurry the process could cause the session to end abruptly. During long meetings, make sure that you do not relax into the pose characteristic of many American men of crossing one leg over the other, with one ankle placed over an opposite knee. Flashing the sole of the foot in any manner is considered an insult in Pakistan.

Once negotiations are concluded, your Pakistani contact may absent himself from any future business dealings. Most Pakistani businessmen in the position to negotiate with foreigners have seconds-in-command who oversee the implementation of the contract and any subsequent dealings. A second-in-command is likely to be British.

Lastly, do no assume that your effort is hopeless simply because the negotiations appear unproductive. Establishing a business relationship in Pakistan takes patience, trips abroad, dozens of meetings, and a marketing budget healthy enough to support all this.

--Linda Newcomb

domestic incompatibility sometimes leads to separation. At the death of the patriarch, each son establishes a separate household.

Marriage solidifies all social relationships. Single adults have little place in society. Women achieve status and security by bearing sons. Nothing else affords them these benefits. Tradition, not love, motivates marriage so the families of the prospective bride and groom usually arrange all aspects of the marriage.

Although women often marry by the age of 17, men may wait until they are older and more established. More than 96 percent of the population had been married at least once by the age of 30 in 1981. In 1985, nearly 40 percent of women under 20 were married.

Women, although protected by law, are often deprived of their legal rights where marriage is concerned. The Muslim Family Laws Ordinance of 1961 contains strict guidelines governing divorce and polygamy, but women are often unaware of their rights and husbands readily ignore both Islamic injunctions and civil legislation.

COMPARATIVELY SPEAKING

Illustration by Diana Souza

Only about 7 percent of Pakistani women work compared to nearly 20 percent of Indian women.

COMPARATIVELY SPEAKING

Cities with populations over 100,000:

Karachi	5,103,000	Bahawalpur	178,000
Lahore	2,922,000	Kasur	155,000
Faisalabad	1,092,000	Gujrat	154,000
Rawalpindi	806,000	Okara	154,000
Hyderabad	795,000	Sahiwal	152,000
Multan	730,000	Mardan	148,000
Gujranwala	654,000	Sheikhupura	141,000
Peshawar	555,000	Mirpur Khas	124,000
Sialkot	296,000	Larkana	123,000
Sargodha	294,000	Wah Cantt	122,000
Quetta	285,000	Rahim Yar Khan	119,000
Islamabad	204,000	Chiniot	106,000
Jhang	195,000	D.G. Khan	103,000
Sukkur	193,000	Nawabshah	102,000

Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan (1981 Census)

LITERACY AND EDUCATION

Although still low, Pakistan's literacy rate is slowly improving. By 1981, just over 26 percent of Pakistanis were literate, up from nearly 22 percent just ten years before. Islamabad Federal Territory's literacy rate of nearly 52 percent places it first among Pakistan's regions. FATA pulls up the rear with a 6.4 percent literacy rate. Generally, urban areas fare better than rural ones. Lower literacy rates for women than men in all provinces and at all age levels come as no surprise. In 1985, only 7 percent of young women were enrolled in secondary school, compared to 27 percent of young men.

Pakistani schooling is divided into five levels: primary school, grades 1-5; middle school, grades 6-8; high school, grades 9 and 10; intermediate school, grades 11 and 12; and higher-degree programs, grades 13 and up. Only 23 percent of the population aged 10 or older has completed primary school. Fewer than one percent hold a university degree.

Although the Pakistani government aims to build more schools and increase the quality of education, such problems as the perceived necessity for child labor, rapid population increase, and a tradition that does not stress education stand in the way. Former government programs concentrated on upper-level education; accordingly, the number of universities doubled between 1975 and 1982 to the current total of 20. The recent focus on primary education increased the number of primary and middle schools by nearly 40 percent. However, the substantial increase in school enrollment in recent years has been offset by a correspondingly higher drop-out rate.

Universities often bear the brunt of Pakistan's uncohesive society. Periodically, armed factions of Islamic fundamentalists, secularists/leftists, and ethnic nationalists clash, closing campuses for sustained periods.

LABOR FORCE

Little hard data is available regarding Pakistan's labor force. Government data often are estimates. In 1985, the economically active population was estimated at 28.6 million compared

with 10.4 million in 1951. The rapid growth of the labor force mirrors the high population growth rate and the tendency of school-age children to work. In 1985, an estimated 21 percent of all 10-to-14-year-olds and just over 40 percent of all 15-to-19-year-olds worked.

Agriculture, including forestry and fishing, employs the vast majority of the country's labor force, although in increasingly smaller proportions. In 1983, about 55 percent of all workers were involved in agricultural activities compared to 57 percent in 1972. The proportion of the labor force involved in mining and manufacturing grew slowly from 12.9 percent in 1972 to 13.7 percent in 1983, in the trade industry from 10 percent to 11 percent, in construction from 3.4 percent to 4.2 percent, and in public utilities from 0.4 percent to 0.5 percent. Those working in the transport and communications sector remained at 4.7 percent, while the proportion of workers in other services declined from 11.2 to 10.3 percent.

Unemployment rose slightly from an estimated 3.1 percent in 1981 to 3.5 percent in 1983. Unemployment struck twice as hard at women--7.5 percent in 1981--although women made up less than 4 percent of the total work force. Only 3 million of Pakistan's over 44 million women worked in 1985.

Although most workers have the right to form and join unions, only about 7 percent of the work force is organized. Union workers stage slowdowns and walkouts although labor laws prohibit industrywide collective bargaining and strikes.

Pakistanis are encouraged to seek work abroad. An estimated 1.5 to 2 million male Pakistanis did just that in 1983. Most went to Arab oil countries and worked construction. In 1983, Pakistani workers abroad sent $2.6 billion home, up from $2.2 billion in 1982. This trend is expected to abate, however, if world oil prices remain depressed.

Marked by years of rapid growth alternating with periods of virtual stagnation, the Pakistani economy is currently on the upswing. In 1985, government controls to curb inflation and favorable farming conditions brought about a record rise in the Gross Domestic Product (GDP) of 8.4 percent.

The largest share of the economy belongs to the service industries, accounting for 45.8 percent of the GDP in 1985. Although agriculture grew by a record 9.9 percent in 1985, its share of the GDP declined to 24.7 percent from 27 percent in 1983. Agriculture--the traditional foundation of the economy--is slowly giving way to manufacturing. Manufacturing gained the largest share of the GDP, growing from 20.1 percent in 1983 to 21.1 percent in 1985.

Imported consumer goods are cost prohibitive to the average Pakistani. In 1983, total consumer expenditure per person averaged only $294, or $1,471 per household. Total private expenditure amounted to about $26.5 million. In 1985, only 2 percent of households owned cars; 11 percent, refrigerators; 2 percent, washing machines; 3 percent, telephones; 6 percent, televisions; and 12 percent, radios. In 1982, sales of tape recorders, radios, and color televisions beat out other durables garnering $1.1 million, $0.6 million, and $0.4 million, respectively.

Imports of consumer goods come principally from Japan and the U.S. In 1985, despite the strong dollar, the U.S. share of the import market was 11 percent, second only to Japan. Imports of manufactured goods in 1982 were mainly articles of clothing ($135.7 million), toys and sporting goods ($32.9 million), articles of plastic ($20.9 million), watches and clocks ($16.8 million), and footwear ($9.4 million).

Imports of basic commodities in 1982 totalled about $5.2 billion. The import of fuels and lubricants led with $1.6 billion in sales. Machinery and transport equipment followed closely, totalling $1.2 billion. Basic manufactures accounted for $758 million in sales; chemicals, $539 million; oils and fats, $321 million; and crude materials, $292 million.

Excellent opportunities exist for

Population distribution by province

(in thousands)

PROVINCE	1961	1972	1981	% CHANGE 1972-1981
PUNJAB	25,582	37,845*	47,632*	+25.86
SIND	8,367	14,156	19,029	+34.42
NWFP	5,731	8,389	11,061	+31.85
FATA**	1,847	2,491	2,199	--11.72
BALUCHISTAN	1,353	2,428	4,332	+78.42
PAKISTAN	42,880	65,309	84,253	+29.01

* Includes Federal Capital Territory Islamabad
**Federally Administered Tribal Areas
Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan

Percentage distribution of households by language usually spoken and region/province (1981 census)

PROVINCE	URDU	PUNJABI	PUSHTO	SINDHI	BALUCHI	BRAHI	HINDKO	SARAIKA	OTHERS
Punjab	4.3	78.7	0.8	0.1	0.6	*	*	14.9	0.1
Islamabad	11.2	81.7	4.2	0.2	0.2	*	0.6	0.1	1.8
Sind	22.6	7.7	3.1	52.4	4.5	1.1	0.3	2.3	6.0
NWFP	0.8	1.1	68.3	0.1	*	*	18.1	4.0	7.6
FATA	*	0.1	99.8	0.1	*	*	*	*	*
Baluchistan	1.4	2.2	25.1	8.3	36.3	20.7	0.1	3.1	2.8
Pakistan	7.6	48.2	13.2	11.8	3.0	1.2	2.4	9.8	2.8

*Less than 0.05 percent. Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan.

TIPS ON TRADE

Apple woos French computer market

What made Apple France the company's most profitable division outside the United States in 1985? Appealing to the French esprit, says the French division's director, Jean Calmon, in a recent issue of *France Today* (Volume 2, Number 1).

Setting up users' groups, or clubs, played up to the French love of exclusivity; the rainbow-striped apple on everything from T-shirts to jogging suits spoke to their fascination for labels and logos. French pride also had its day. Apple France's annual *concours*, or open call, for programs written by French programmers points to Apple's insistence on making its computers as French as possible. Apple France's computers offer French accents, letters, and punctuation marks on their keyboards.

But keeping its market share (nearly 21 percent of the market in 1985) means new strategies in 1986. The increasingly segmented French computer market--with dealers concentrating on a particular market niche --requires a sales staff with specialized skills and knowledge. Apple France's new technical sales support department aims to educate its 450 dealers (up from 15 in 1981) about new products and help them, in some cases, to sell and service specific accounts.

Big winners in Japan's import market

Think of Japan. Geisha, computers, and sushi come to mind. But in this land known for its computers, America's Big Blue controls 40 percent of the computer market. IBM is not alone. Many American and foreign giants command major shares of the Japanese market.

According to the Japan External Trade Association, Schick controls 70 percent of the safety razor market; Pampers, 50 percent of the paper diaper market. Six out of every ten soft drinks sold in Japan are Cokes. Nestle dominates instant coffee sales with 60 percent of the market. Even tea gives way. Lipton sells 30 percent of the black tea consumed in Japan.

Other winners are Olivetti typewriters, with 35 percent of the market; Xerox photocopiers, with 20 percent of the market; Kodak photographic film, with 20 percent of the market; Pyrex heat resistant cooking ware, with 30 percent of the market; and Kleenex tissue paper, with 20 percent of the market.

British buy better furniture

Imports of furniture increased about 25 percent from 1982 to 1983 in Britain with imports from the U.S. doubling during this period. The demand for furniture is expected to continue through 1987 with an emphasis on better-quality dining room, bedroom, upholstered, and self-assembled wood furniture •

industrial sales of equipment suited for agriculture, the petrochemical and chemical industry, transportation, electric power generation, scientific research, hospital and health care, and communications. Airport construction, transport projects, and engineering projects also provide lucrative opportunities.

SOURCES OF INFORMATION

Numerous government documents containing census information as far back as 1947 and as current as the latest 1981 census are published by the Pakistan government in English. Contact Federal Bureau of Statistics, Publication and Publicity Section, 1-S.M.C.H Society, Karachi-3, Pakistan: telephone 439101/246.

All chambers of commerce and industrial trade associations in Pakistan are affiliated with the Federation of Pakistan Chambers of Commerce and Industry, St-28 Sharah-e-Firdousi, Block 5, Kehkeshan, Main Clifton, Karachi, Pakistan. To locate the trade organization applicable to a specific industry, contact it at the above address.

The U.S. Department of Commerce offers a number of useful publications. *Marketing in Pakistan* (OBR 82-01) and *Foreign Economic Trends* (FET 85-102) provide detailed economic and foreign trade information. Obtain both publications from the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402; telephone (202) 738-3238. A list of all Country Market Surveys and selected International Market Research reports are published in the newest catalog of Market Research Division reports. To obtain a free copy, contact International Market Research Services, ITA/EPS, HCHB 1324, P.O. Box 14207, U.S. Department of Commerce, Washington, DC 20044; telephone (202) 377-2665.

Current information on marketing conditions in Pakistan is also available from the Commerce Department's trade specialists. Contact them at the following address: Pakistan Country Specialist, ITA/IEP, HCHB 2029-B, U.S. Department of Commerce, Washington, DC 20230; telephone (202) 377-2954. Euromonitor Publications Limited provides relatively current, difficult-to-obtain marketing data on Pakistan in its annual publication, *International Marketing Data and Statistics.* Contact Euromonitor Publications Ltd., 87-88 Turnmill Street, London EC1M 5QU.

The government of Pakistan is represented by its embassy in Washington and a consulate in New York. Contact the Pakistan Embassy, 2315 Massachusetts Avenue, N.W., Washington DC 20008; and the Pakistan Consulate General, 12 E. 65th Street, New York NY 10021. •

--Linda Newcomb

Linda Newcomb is a freelance writer who has lived and worked overseas.

FEATURE

How French women see themselves

Bardot, de Beauvoir, and Deneuve--faces everyone sees as French. But how closely do French women identify with these icons of French womanhood and the values they represent? *Plurielles*, a new study conducted by two of France's leading research groups, reveals French women as they see themselves. This study--said to be the first on a large scale to probe attitudes and behavior of French women beyond their consumer patterns and place in society at large--found ten types of mesdames and mesdemoiselles among its 1200 participants aged 13 to 70. There are about 22 million women in France aged 13 to 70.

The Keepers of the Flame

Liberation to the wind, *Plurielles* found a surprising 20 percent of French women believing that a woman's place is in the home. Most in this group saw their husbands as rulers of the roost. Catering to their husbands' and children's needs took precedence in their lives. For many in this group, love took second place to social stability in marriage. Mother Teresa and singer Linda de Suza--a top entertainer who arrived in France as a penniless immigrant and who espouses traditional values--appeal to this group.

The Transitionals

Valuing home and children more than careers, the Transitionals walk in the shoes of their mothers while encouraging their daughters to step out and profit from the changed work climate. Women from this group (the second largest category at 13 percent) approve of job advances for women while holding more conventional attitudes for themselves. The prominent radio talk show moderator Eve Ruggieri matches their self-image.

The Congenials

Sensual and receptive, women in this group strike a balance between values such as home and family and work as a means of gaining recognition. Major French news broadcaster Belgian-born Christine Ockrent, is admired by these women.The Congenials account for 11 percent of study participants.

The Unfulfilled

The Unfulfilled feel that their sacrifices for home, family, and husband go unrecognized. The homes where they are workaholics imprison them. Although the Unfulfilled adhere to traditional roles, they are jealous of women with an active professional life. The film actress Catherine Deneuve appeals to this group, which accounted for 10 percent of survey respondents.

The Torn

Traditional and more liberated values tug at this group, which makes up 9 percent of survey participants. Economic necessity forces these women into the workplace at the expense of living a fully enriched personal life. A more liberated lifestyle is still down the road for them. Princess Caroline of Monaco symbolizes their ideals.

The Competitors

Women in this group see a job as a way out of the homemaker role. Very active and pugnacious at work, they prefer aggressive women to overly feminine ones. Making up 9 percent of survey respondents, they identify with leading French conservative politician Simone Veil.

The Homemakers

The Homemakers revolve their lives around home and family. According to the study, this group of women is France's most contented flock. Very religious, they reject both abortion and birth control. Not all new trends pass this group by, however. The Homemakers are very conscious of good health and fitness. Making up 8 percent of survey participants, the Homemakers identify strongly with Mother Teresa.

The Explorers

The lives of these women are rich with activities they explore for personal satisfaction. They are determined to succeed at work which, like marriage and family, is an ingredient for happiness, not an end in itself. Simone de Beauvoir appeals to this group making up 8 percent of survey participants.

The Improvisers

Accounting for only 6 percent of women surveyed, this group leads an unstructured life, improvising from day to day, enjoying the unexpected. The Improvisers shun responsibility and traditional values but are unhappy casting about for self-fulfillment. Jane Birkin, a British-born actress living in France, typifies their ideal.

The Baby Dolls

Brigitte Bardot is their role model. Although they demand attention from men, the Baby Dolls are willing to admit that men are superior to women. Only 6 percent of respondents identified with this group.

Plurielles was developed and conducted jointly by the nine-year-old

Institut Francais de Demoscopie (IFD) and *Agence Femmes Information (AFI)*. The study represents a departure from previous research on French women that focused on specific consumer behavior at targeted sociocultural levels, according to Marianne de Souza, an IFD director. *Plurielles*, says Souza, not only updates data on consumer attitudes but also explores the life of French women in depth and reports on personality traits, sexual attitudes, budget management, approaches to work, advertising perceptions, and the feminist movement.

The initial qualitative phase of *Plurielles* research found five poles around which French women organize their lives--home, the couple, children, work, and self. Thirty-five individual interviews were conducted in the Paris area, in the northern city of Lille, at Rouen, northwest of Paris, at Niort in the western Deux-Sevres department, and at Marseilles on the Mediterranean coast. Interviews ran for two and one half hours. Three-hour group sessions were held in Paris--one with working women, one with nonworking women. An additional session with nonworking women was conducted in Rouen. For the quantitative phase, 1200 women aged 13 to 70 responded to a questionnaire designed to discern a wide range of attitudes and activities.

The entire *Plurielles* study is available for $25,000. This includes seven separate documents detailing the qualitative phase, data analysis leading to definitions for the ten types of women, and individual quantitative reports related to the home, consumer patterns, involvement in city life, values, and media. Portions can be obtained separately. For more information, contact Institut Francais de Demoscopie, 26, rue de Chambery, 75015 Paris, France; telephone, (1) 48.42.60.00; telex, 204986-F. AFI, which can supply additional information on French women and the European Community in general, is located at 9, cite de Trevise, 75009 Paris; telephone, 45.23.45.24. •

Peter Inserra

FEATURE

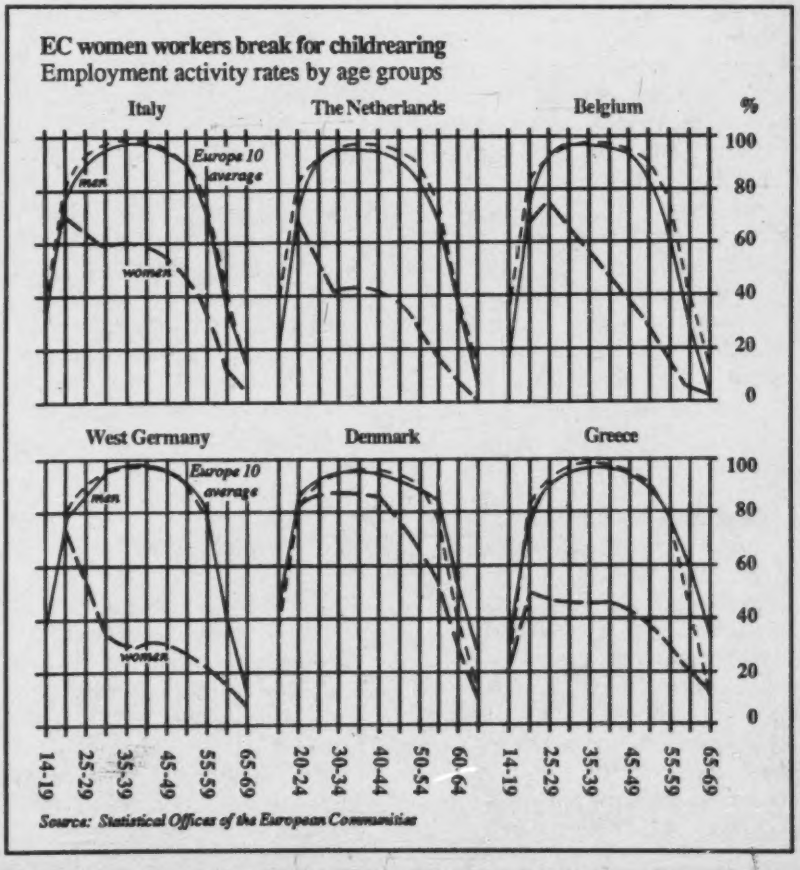
Women bring up employment rates in the European community

New statistics from the European Community labor force survey place 54 percent of persons aged 14 or over in the Community having a job or seeking one in 1983. The proportion of men in the labor force was 70 percent; the proportion of women, 40 percent.

Countries with high activity rates included Denmark (64 percent), the U.K. (58 percent), and France (56 percent), owing largely to the high employment rate among women (57 percent in Denmark and 45 percent in the U.K. and France). These figures compare to the U.S. activity rate of 64 percent in 1983, with a 53 percent rate among women.

Among men in the Community, Ireland came out tops with a 74 percent activity rate, but its very low activity rate among women (33 percent) pulled it below the Community average for men and women as a whole.

Generally, the childrearing years--the first 10 years of marriage--remove women from the labor force. The activity rate for women peaks at about 70 percent in the 20-to-25 age group, then drops steadily until the 30-to-35 age group is reached. After marriage, the activity rate among women in the Community drops from 48 percent to 42 percent. Denmark, Belgium, and France prove to be exceptions, where figures of 58 percent, 34 percent, and 65 percent rise to 65 percent, 40 percent, and 50 percent, respectively.



Employment rates in selected population groups, 1983 (in percent)

		West Germany	France	Italy	Netherlands	Belgium	Luxembourg	United Kingdom	Ireland	Denmark	Greece	Europe
Total	Total	50.8	51.9	45.0	44.0	43.9	47.7	51.4	45.7	58.1	47.0	49.3
	Male	66.3	64.7	63.8	59.7	59.5	66.1	63.2	63.2	65.2	66.6	64.2
	Female	37.1	40.4	27.7	28.7	29.3	30.4	40.4	28.1	51.3	29.2	35.6
Young, 14-24 years	Total	45.1	38.7	31.3	35.0	30.6	48.2	46.7	43.0	48.4	30.1	39.9
	Male	48.2	43.8	37.2	34.0	34.0	50.4	49.4	45.5	51.0	37.8	43.8
	Female	41.9	34.0	25.6	35.8	27.1	45.8	43.9	40.4	45.7	23.4	36.0
Single persons	Total	49.9	46.4	40.1	41.2	33.2	52.7	48.5	49.6	55.0	40.3	45.6
	Male	54.0	52.1	48.4	42.7	38.6	56.3	52.1	52.8	59.3	47.7	50.8
	Female	45.1	40.1	30.9	39.3	26.5	48.3	44.3	45.5	49.9	31.8	39.6
Married	Total	56.6	59.1	51.6	49.1	51.4	50.4	58.1	46.9	66.1	53.6	55.7
	Male	74.1	72.3	73.5	70.3	70.1	73.2	70.8	73.8	71.6	75.5	72.6
	Female	39.4	45.7	29.9	27.8	33.4	27.2	45.4	20.2	60.5	32.0	38.8

Source: Statistical Office of the European Communities.

Figures vary widely from country to country for women returning to the workplace after raising their children. In the U.K., women return to the workplace en masse, with the 40-to-50 age group registering the highest activity rate among women, hovering around 70 percent. In the Netherlands, Belgium, Luxembourg, and Ireland, however, female employment falls sharply after the age of 30.

Among men, in contrast to women, marriage increases the activity rate. The Community average for men after marriage rises from 60 to 76 percent. Young men stand out with low activity rates due to their participation in higher education, vocational training, or the military. Over 95 percent of men between the ages of 30 and 55 in the Community had a job or were seeking one.

Thirteen million persons in the Community are part-time workers, of which 11 million are women. Part-time workers make up about 12 percent of the total work force. About 9 million part-time workers are married. Italy, Belgium, Luxembourg, Ireland, and Greece have the fewest part-time workers, with barely 5 percent of the workforce employed part-time. The proportion of part-timers in the labor force of Denmark, the U.K., and the Netherlands, in contrast, registers a high for the Community of about 20 percent each.

These statistics were compiled by the Statistical Office of the European Communities, L-2920 Luxembourg-Kirchberg, rue Alcide De Gasperi, Batiment Jean Monnet; telephone, 43011; telex, Comeur Lu 3423. They were published in the January 1986 edition of *Eurostat News*, a quarterly publication. •

PUBLICATIONS

A Half Step Behind: Japanese Women of the '80s, by Jane Condon, 1985, New York: Dodd, Mead & Company, 319 pp., $16.95 hardbound.

Noriko Aoki, a 36-year-old Japanese Yuppie, had an arranged marriage. Each family hired a detective to check up on the other family. Noriko didn't mind at all, feeling it was expensive but worth it to ensure the success of her marriage.

Miki Suzuki called off her days-away wedding after meeting her husband-to-be's conservative parents for the first time. Distressed by the failure of her love relationship, she now is considering an arranged marriage.

What is remarkable about these stories is not in their telling but the candor in their telling. For the Japanese, "truth" is a variable. *Tatemae* is the surface truth, the version molded to fit society's needs. *Honne*--the real truth--is rarely told, especially if it involves an individual's personal opinions.

In the interviews that make up *A Half Step Behind*, Jane Condon reveals the hidden truths of life as a Japanese woman. Teachers, students, housewives, career women, blue-collar workers, and entertainers among others speak out about their marriages, their families, about divorce and widowhood, about their education and the education of their children, and about the jobs they hold.

It's a rare look at the real Japan, one most worth taking.

Urban FSA and Rural Postal Code Summary Data, 1984, No. 17-602, Statistics Canada, Ontario, Canada.

This publication is an excellent tool for market researchers and direct-mail marketers. It provides a portrait of the tax filers of 7,000 specific postal code areas. The data present population characteristics for 27 variables, including age group, sex, income, and labor force status. One thousand urban Forward Sortation Areas (FSA, the first three characters of the postal code) and 6,000 rural postal codes are described.

Five editions are available: one for all of Canada and one for each of the four major regions. The Canada package (No.86-000) is $295. Remaining issues are $112 per region: Alantic Provinces (No. 86-001); Quebec (No. 86-002); Ontario (No. 86-003); and Western Provinces and Territories (No. 86-004). Order from: Statistics Canada, Publications Sales and Services, Ottawa K1A OT6, Canada. •

FEATURE

Media Advertising in Japan

In 1981, Japan spent well over $10 billion on media advertising. By 1983, this figure had risen to $11.6 billion. This ranked Japan second only to the U.S. in total advertising expenditures.

The largest share of advertising expenditure in Japan in 1981, just over 34 percent, went to TV, up from 32 percent in 1971. The newspaper share of advertising expenditure was nearly 31 percent, followed by direct mail and outdoor advertisements at just under 22 percent. The radio share was about 5 percent; the magazine share, about 6 percent.

Japan has 48 VHF and 51 UHF television stations for a total of 99 stations that operate through the sale of commercial broadcast time. As of 1982, the cost of prime time--between 7 and 10 p.m. weekdays and on Saturday, and from 6 to 10 p.m. on Sunday--was about $7000 for 30 minutes of sponsored time and about $2800 for a 15-second spot. Additional costs are required for broadcasting over a national network instead of just in the area served by the TV station.

Newspaper ads often come in the form of *orikomi*, a peculiarly Japanese fold-in ad. As most newspapers are delivered to homes rather than bought at newsstands, newspaper delivery companies accept separately printed, single-sheet ads which they fold into newspapers before delivering them. About 80 percent of *orikomi* advertisers are retailers such as local stores, supermarkets, or department stores. Distribution costs for 3,000 sheets in 1981 ran from about $30 to $50.

Another way to reach the Japanese consumer is through printed advertisements on railway cars and buses. In the Tokyo area alone, commuter trains carried about 10 billion riders in 1980. Since commuters log in an average of three hours a day going to and from work, transit advertising has a captive audience. Rates for transit advertising vary according to the number of commuters who ride the line. On Japan National Railway's Chuo Line--one of Tokyo's most crowded commuter lines--two days with 1730 posters (one poster per car) cost nearly $3000 in 1981.

As in other countries where the mass media are highly developed, products sold primarily by the particular image they project are the most heavily advertised in the Japanese media. Pharmaceuticals, cosmetics, soap, electric appliances, and leisure-time products dominate the major media. The higher level of advertising expenditure on housing, however, sets Japan apart.

Nondurable, everyday items rely heavily on radio and television spots in Japan. About one-half of television and radio advertising expenditure in 1981 went for clothing, pharmaceuticals, appliances, foodstuffs, and cosmetics and soaps.

Newspapers and magazines, on the other hand, were dominated by ads for housing and construction materials, machinery, books, and financial organizations. Foods and beverages, however, were heavily advertised in magazines, accounting for 15 percent of all magazine ads.

Point of Purchase (POP) advertising is gaining popularity with retailers, particularly specialty stores. The lack of floor space in Japan's typical retail store does present a problem however. Not all POP materials supplied to retailers are displayed. The Japan External Trade Organization (JETRO) therefore advises potential users of POP ads to coordinate the use of POP ads with other types of advertising such as in newspapers or on TV.

--Denise Rusoff
Source: JETRO

COMING UP

Belgium: A heavily industrialized country at the hub of Europe

Japan's coming import boom: How consumers view imports

International Demographics
P.O. BOX 68, ITHACA, N.Y. 14851

FIRST CLASS MAIL
U.S. POSTAGE
PAID
PERMIT NO. 780
ITHACA, NY 14850